

**KUNAL**

**MAIL:** **kunal-397328@gulfjobseeker.com**

**PROFILE SUMMARY**



**CFA from ICFAI Tripura University qualified with 11 years of diverse work experience. Handled self-created business portfolio of HNI clients.**

**Providing support for self-trading clients, Introducing Brokers and Money Managers.**

**Meeting clients, conducting seminars and educating them about risk management and profit maximization in margin trading**

**Maintaining stocks, daily sales report, stock transfers in and out, ledger, pricing and billing. Meeting monthly, quarterly or annual sales goal, depending on the company’s targets.**

**Preparation of dynamic Financial Models – (Income Statement > Cash Flow> Balance sheet> Depreciation) and (Discounted Cash Flow & Merger Model)**

**Performed Independent Valuations on companies of various sector. Creating Invoices, Revenue accruals and Contract management.**

**Client Servicing**

**Being solely responsible for the revenue side of the P&L for the projects undertaken. Ensuring timely closing of the invoices on a monthly basis within the contractual client**

**deadlines.**

**Ensuring DSO (Daily Sales Outstanding) target is met.**

**Ensuring the compliance of the processed invoices with the respective contracts and SOWs. Team Handling**

**CURRENT JOB ROLE**



**Relationship Manager** **Jan 2019 – Sep 2019**

**Handled a self-created portfolio of HNI clients who trades in Forex, Commodities, Bullion, Indices and crypto currencies worldwide.**

**Sales & Client Servicing:**

**Network and target HNI for business prospects.**

**Analyzing client's profile by helping them select the appropriate investment portfolio. Profile Summary**

**Following financial markets, implementing various trading strategies by combining technical and fundamental analysis.**

**Maintain the business portfolio risk profile within agreed parameters at all times, including monitoring/reporting of irregularities and customer KYC, AML etc.**

**Providing support for self-trading clients, Introducing Brokers and Money Managers.**

**Meeting clients, conducting seminars and educating them about risk management and profit maximization in margin trading.**

**Sourcing new leads, making contact, onboarding them and forging profitable ongoing relationships.**

**Analyzing sales report and company goals to develop new strategies in collaboration with the Sales Manager.**

**Keeping an eye on the frequent changes concerning the area of work, hours of operation, spread changes, holidays etc.**

**Making MIS reports and sending to the clients depending on their business products.**

**WORK SUMMARY**



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| --- | --- | --- | --- | --- |
| **Organization** | **Designation** | **Start** | **End** | **Location** |
| **Rivoli Groups** | **Associate** | **Jan – 2015** | **Dec – 2018** | **Dubai** |
| **SMJ Capital Partners** | **Financial Analyst** | **Oct –2013** | **Oct – 2014** | **New Delhi** |
| **Convergys India** | **Finance Associate –Team Leader** | **Nov-2007** | **Aug- 2013** | **Gurgaon – India** |

**EDUCATION SUMMARY**



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| --- | --- | --- |
| **Degree** | **University** | **Completed Year** |
| **CFA – ICFAI** | **Tripura University – India** | **2014** |
| **Investment Banking Certification** | **ARC School of Finance – New Delhi** | **2013** |
| **Bachelor of Accounting** | **Patna University – India** | **2007** |

**PERSONAL DETAILS**



**Nationality: Indian**

**Date of Birth: 14th Nov 1987**

**Marital Status: Single**

**Languages: Hindi & English**

**Driving License: India & UAE**